INTRODUCTION

A Tour of the Desktop

Getting Into EAS

Each user has an individual login and password. Logins permits users to access their own "worksheet(s)" and prevents other users from altering their records. Upon login, a user enters EAS at the top level that is, the desktop. It is possible for the Systems Administrator to set up individual users to log in directly to a specific worksheet. For instance, a purchasing specialist could be set up to always log in to the Purchasing subsystem. For now, let's focus on logging in to the desktop.

Logging In

1. Locate the EAS icon from the Windows Program Manager.

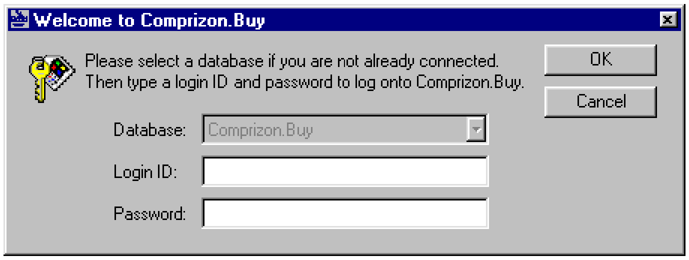
2. Single click to open.

3. Type your login at the Comprizon.Buy™ login screen.

4. Press the <Tab> key to move the cursor to the "Password" field, and enter your password. Note: Passwords do not display on screen.

5. Press <ENTER> or click on the Login button to advance to the Desktop.

Log In Screen



Please select a database if you are not already connected.
Then type a login ID and password to log onto Comprizon.Buy.

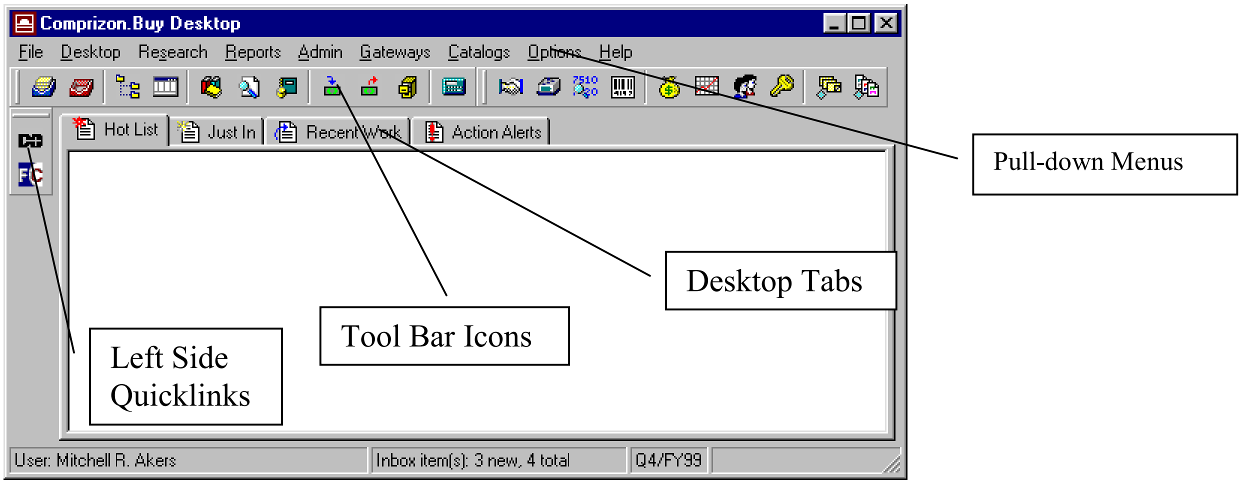
Database: Comprizon.Buy
Login ID:
Password:

After typing in your user Login ID and Password, the EAS Desktop will appear. The next section will show the four basic aspects of the EAS Desktop.

Defining EAS Desktop Icons, Tabs and Toolbars

EAS Desktops contain icons, tabs and tool bars which allow you quick access to important functions, worksheets and data files (Vendor file, Address file and User file).

EAS Desktop


Comprizon.Buy Desktop
File
Desktop
Research
Reports
Admin
Gateways
Catalogs
Options
Help
Hot List
Just In
Recent Work
Action Alerts
Pull-down Menus
Desktop Tabs
Tool Bar Icons
Left Side Quicklinks

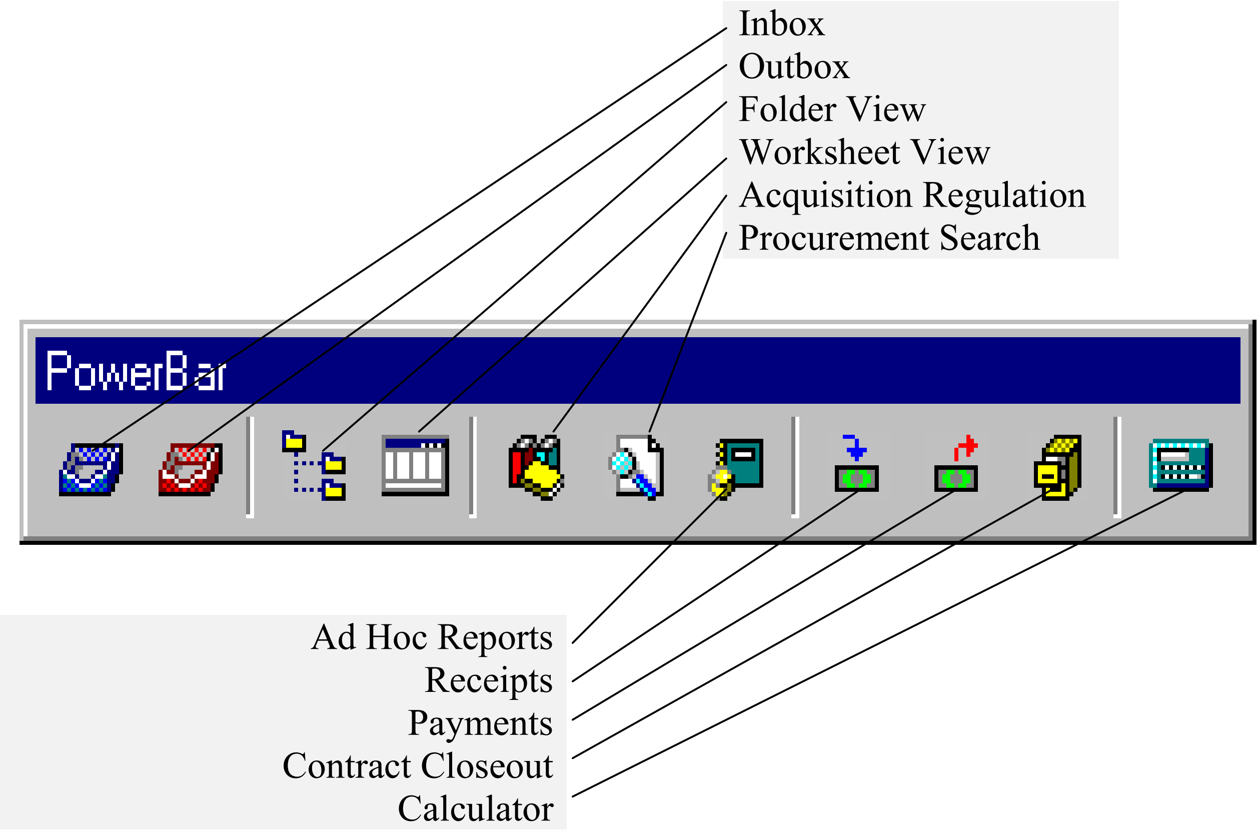
User: Mitchell R. Akers

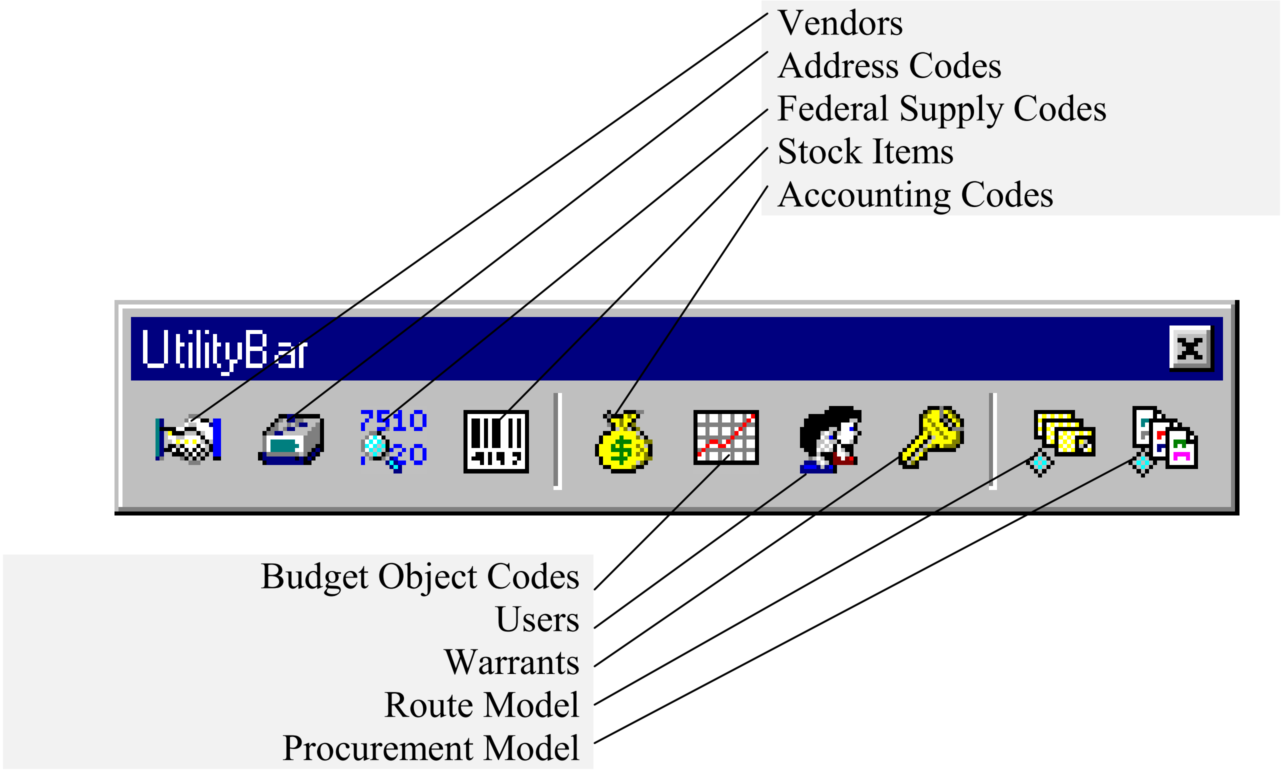
Inbox item(s): 3 new, 4 total

Q4/FY99

Powerbar (Tool Bar)

Using the mouse, point to each of the desktop tool bar icons and "Hover Help" will appear. Icons on the tool bar allow you access to important functions (like accessing your "Inbox," "Outbox," "Worksheet View") and to frequently used data files, such as the "Vendors," "Addresses" and "Users."


Inbox
Outbox
Folder View
Worksheet View
Acquisition Regulation
Procurement Search
PowerBar
Ad Hoc Reports
Receipts
Payments
Contract Closeout
Calculator



In Box:	Review any procurement records routed to your user login ID. Each user has an “In Box.”
Out Box:	Review any records routed from your user login ID.
Folder View:	Display workload in folder view format.
Acquisition Regulations:	This capability allows you access to on-line, up-to-date Federal Acquisition Regulations (FAR), local provisions and clauses. This research option allows “keyword” searches on any loaded supplements. The instruction text is referenced and may be displayed on-line. Local Matrices are created and maintained here to pull into documents.
Worksheet View:	Displays your workload in spreadsheet format
Ad Hoc Reports:	Allows the creation of flexible reports to meet specific site requirements using an English-like query language. This icon accesses the menu where ad-hoc reports may be run in EAS.
Receipts:	Allows users to enter receiving information into the database.
Payments:	Allows users to enter partial and/or final payment information into the database.
Contract Closeout:	Provides for data entry of closeout information on completed award records.
Calculator:	Access the Windows calculator function without leaving EAS.
Vendors:	Stores vendor information such as names, addresses, phone numbers, Tax ID Number, Dun & Bradstreet number, FSC/PSC, status and socio-economic information. Vendor information can be manually loaded into the Vendor file when either an *SF 129*, or other government vendor registration form, is received at the Procurement Office. When using EDI, vendor information is loaded electronically. Any user with permission to use the View function in the Vendor file can research vendor information. Vendor information is

	also used in query reports and in the automatic vendor rotation function.
Address Codes:	All government addresses that are used in the Procurement Office are stored in this file. This includes customer addresses, payment office addresses, issuing office addresses, etc. Once entered in the Address file, addresses can be retrieved on any procurement record by entering an address code rather than typing the entire address. Addresses must be documented correctly for EDI standards.
Federal Supply Code/Product Service Code (FSC/PSC) File:	This file stores all the FSC/PSC codes used in the Procurement Office. FSC/PSC's are mandatory for any EDI RFQ or Award and must first be loaded in to this file before they can be used on a procurement record.
Stock Items:	Stock item numbers can be loaded into the stock item file and linked to a standard stock item description. This description can then be "pulled in" to any line item description on any requisition, PR, solicitation, amendment, award, or modification. This file is particularly useful for items that are purchased over and over: items that include complicated or lengthy description, i.e., ADP equipment, or items in which the Procurement Office would like to keep track of price variances.
Accounting Codes:	Many government agencies use very lengthy accounting codes that are easily entered into procurement records incorrectly. This file allows the Procurement Office to store all accounting and budget object codes (BOC) for each customer in a central file. Once an accounting code has been entered in this file, it can be retrieved by clicking on the Power Search 🔍 and by selecting the appropriate code on any procurement record. This method saves data entry time and cuts down on clerical errors.
BOC:	The BOC file stores valid Budget Object Codes to preclude users from inputting invalid strings in BOC fields when creating PRs, awards, etc.
Users:	Any individual who will be using EAS must first be loaded into the User file. This file stores the individual's name, office address, office phone numbers, e-mail addresses, printer designations, warrant levels, supervisor, login password and signature password. The information in this file is used in a variety of ways. The supervisor code is used to place a copy of all the individual's work on the designated supervisor's worksheet for tracking. The login password ensures that the login ID of the individual cannot be misused. The signature password ensures that only this individual can approve routed documents. The warrant level ensures that the individual cannot be attached to any award or modification that exceeds their warrant level.
Warrants	The Warrant file allows sites to create site-defined warrant levels, update these warrant levels to keep in step with changing federal regulations, and assign only those valid warrants to users in their individual user profiles.
Route Models	Route models are actual lists of review and approval officials, set up in a particular order. These models may then be copied into a route list for a particular procurement action. This procurement action is then sent to each person on the route list in order to be approved or disapproved. A site may create several route models, depending upon the type of procurements processed at the site.

Procurement Models	These models are “boilerplates” of milestone events that occur for a given procurement action. These events may be set up with a listed ordering and a suggested number of days for completion. Users may then copy the model and modify it to address a particular procurement.

DESKTOP TABS

EAS Desktop contains four (4) tabs which allows quick access to user "Hot List," "Just In," "Recent Work," and "Action Alerts." Requisitions, Purchase Requests, Solicitations, and Awards can be listed on the desktop under the first three tabs. Items that require further action in the future will be listed under the fourth tab.

> *Note - All procurement items listed on the desktop can also be found under the appropriate procurement model in worksheet view. The desktop view allows the user easy access to procurement actions.*

Hot List:	This tab lists work you have identified for immediate attention. Hot List items can include any procurement action in any stage of the procurement process. There are three ways to identify work for placement onto the *Hot List Desktop*: Hot List identification can be made from any summary screen by clicking on the "Hot List" 📄 icon; by choosing "Tools" from the menu bar, and then selecting "Add to Hot List" from the drop-down menu; or by right-clicking on the item, and then selecting "Add to Hot List" from the short-cut menu.
Just In:	Work items that are submitted to you are placed on the desktop under the *Just In Tab*. This allows you easy access to as-yet-unseen procurement actions.
Recent Work:	This tab contains any work performed within the last 02 days. If you open any procurement items from the desktop, worksheet, or folder view, the item will appear under the recent work tab of the desktop. EAS automatically removes items after 02 days.
Action Alerts:	This tab contains any work that has been marked with an alert. If your My Profile Preferences Screen has been set, you may also receive e-mail notices of action alerts.

Removing Items From Desktop

Occasionally, you will want to remove items from a desktop tab. Some examples of why a user may want to remove items from the desktop can be the work is complete, procurement action is cancelled, or someone may want to maintain a clean desktop, to name a few. The only way any item can be removed from the desktop is to right click on the item, scroll down and choose "Remove."

Note: Any work removed from desktop is not removed from EAS. Removed desktop items can be found on appropriate worksheets, (e.g. Customer, Purchasing, Contracting).

Left Side Quicklinks

This space on the desktop is reserved for quick links to Web sites and applicable programs and/or files. The icons have "Hover Help" to identify the name or web location of the quick link.

Pull-Down Menus

Icons serve as a quick and convenient way to access your functions and files. However, anything that can be accessed through an icon, is also contained on a pull-down menu located on the top of the EAS Desktop. Pull-down menus also include additional functions that are not located on the tool bar.

The Summary Window

The summary window is the "face" of all procurement actions. The title bar for this screen will display what type of action is open and the procurement number. This window, for example, summarizes everything about the action, including routing information, status, EDI information, stage of procurement and more. The underlined words are hyperlinks to quickly take you to that particular section of the procurement action. For example, clicking on "Administration" will take you to the Administration section of the procurement action, where data entry and editing can be completed.

Pull-down Menu Functionality

"File" "Tools" "Options" "Gateways" "Forms" - Each of these pull-down menus in this example offers you specific record access and functionality (i.e., Printing, Routing, Supporting Documentation, Submitting, etc.). This functionality is available on the desktop and all summary screens . The menu titles may vary for different screens.

Associated Document

After you click a hypertext link (underlined and in blue), an Associated Document displays the documentation associated with the action in the desired procurement stage.

Status Information

This field maintains an updated status of your action, from unsubmitted to closed.

Routing Information

This field will display the person or persons the action has been routed to for review. If the action has not been routed, a check mark will appear in the box proceeding the "Not Routed" box.

Quick Access "Links"

The blue hypertext links within a summary window allow one-click access to key sections of the procurement action. The "Administration" link will allow you access to the administrative section of the record, just as "Line Items" will link you to the line item information. To exit the summary window and return to the previous screen, click on the "Close Window" ☒ icon in the upper right-hand corner.

Working Views

EAS allows work to be done from either of two views: Folder or Worksheet views.

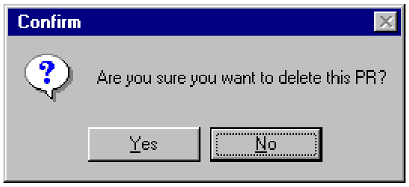
Folder View - This view is comparable to the Windows Explorer feature in Windows95. All your related contracting actions could be grouped in electronic file folders. Once you open a folder, you can browse through electronic folders to find a specific group of actions. When you double-click on a desired folder to open it, you can view a listing of all the actions stored in that folder. When you use the scrolling arrows on the right side of the window, you can browse through folders or files. Once a desired file is found, you can highlight it and open it by double-clicking on it.

Worksheet View -This view uses a series of filters applied to the worksheet to help you organize all work based on the type of contracting action or the team assignment. Additionally, actions that have been canceled, suspended or closed are also viewable separately. When an action is submitted or assigned it will initially appear in red, signifying a "new" and previously unopened action. When an action is opened it is automatically moved to an area known as the "Current Procurement" worksheet. When EAS closes, EAS returns your actions to the appropriate worksheet filter areas.

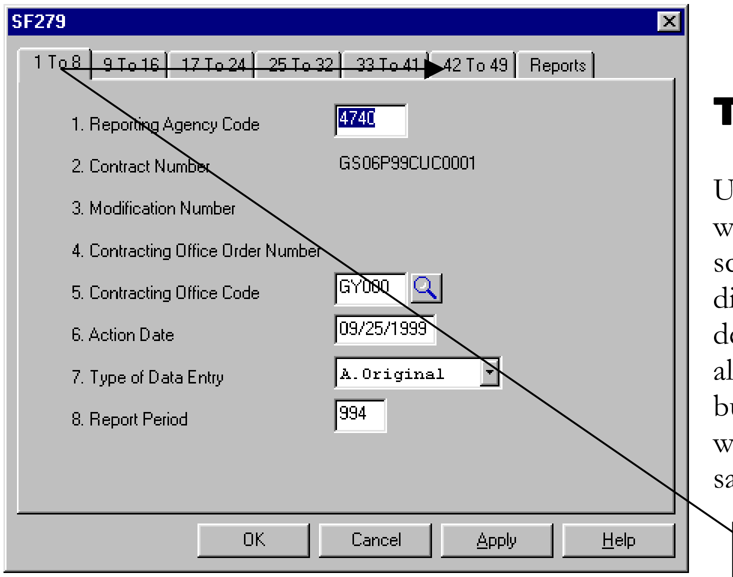
As a contracting action progresses, EAS will automatically move work to the appropriate worksheet area, allowing you to view only the selected type of action or the actions of your team. To change from one filter to another, return to the worksheet screen and change filters from the drop-down listing. In the award or solicitation filter worksheet users can still view the original PR or solicitation associated with that action. To view the desired related action, first highlight the action, then click in the box at the top on the PR or Solicitation column, as appropriate, and then double click the highlighted action to view the associated PR or Solicitation.

Dialogue Boxes

Dialog boxes serve as a silent validation, presenting you "YES" or "NO" options. The dialog box you know that the action requested is irreversible; any data not saved or deleted will not be recoverable.



Are you sure you want to delete this PR?


SF279
1 To 8
9 To 16
17 To 24
25 To 32
33 To 41
42 To 49
Reports
OK
Cancel
Apply
Help

1. Reporting Agency Code: 4740
2. Contract Number: GS06P99CUC0001
3. Modification Number
4. Contracting Office Order Number
5. Contracting Office Code: GY000
6. Action Date: 09/25/1999
7. Type of Data Entry: A.Original
8. Report Period: 994

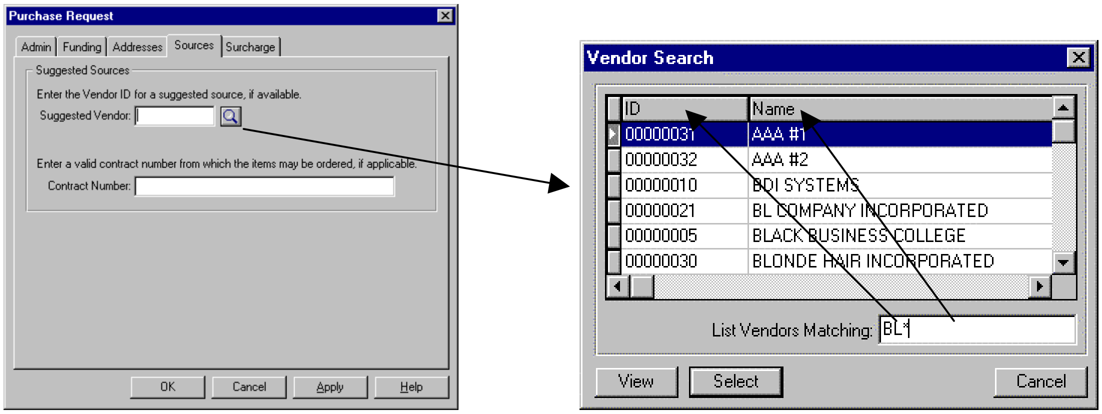
Tabs, Tabs and More Tabs

Using the tabs when creating or accessing a record within EAS is similar to one-stop shopping. Each screen contains several options. The tabs separate different sections of the record. Simply click on the desired tab. This action opens the record and allows data entry or editing. Clicking on an "Apply" button saves your work and allows you to continue working on that tab. Clicking on an "OK" button saves your work but also closes the window.

Work through tabs, left to right, top to bottom

Spy Glass (Power Search)

The Power Search feature is found in certain fields to allow you to search for information or records, such as a vendor code, an organizational address, or a DUNS number. The key to a successful search is accurate entry of search information. Since some lists of information or records are extremely large, it is important to effectively use whatever information you already know about the record that needs to be found.


Purchase Request
Admin
Funding
Addresses
Sources
Surcharge
Suggested Sources
OK
Cancel
Apply
Help
Vendor Search
View
Select
Cancel

Enter the Vendor ID for a suggested source, if available.

Suggested Vendor:

Enter a valid contract number from which the items may be ordered, if applicable.

Contract Number:

ID	Name
00000031	AAA #1
00000032	AAA #2
00000010	BDI SYSTEMS
00000021	BL COMPANY INCORPORATED
00000005	BLACK BUSINESS COLLEGE
00000030	BLONDE HAIR INCORPORATED

List Vendors Matching: BL*

EAS presents the key fields for the record across the top of a search window. Typically the first two or three fields are the most effective or commonly used search criteria. If the full name of the vendor is known as it appears in EAS, enter this name in the window at the lower right-hand side of the search window and click on the title bar of the "Name" field. Otherwise use the following table to assist you to effectively search for needed data:

When you enter…	Search results will list…
Baxter Research Medical, Inc	Records exactly matching what you typed.
Baxter*	Records beginning with "Baxter."
Baxter	Records containing "Baxter."
*Baxter	Records Ending with "Baxter."

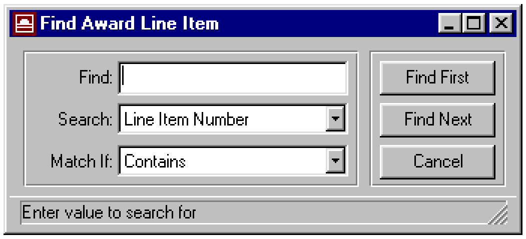
Note: *The search string input must match the search criteria searched, if a name or part of a name is entered then click on the "Name" field. If a name is entered in the search string input and ID is clicked, the search will not be successful.*

Find Box

Another powerful search engine in EAS is known as "Find," represented by the icon. This function is designed to quickly locate records found on various browser screens such as the *Line Item Management Browser.* As with the power search, to successfully use "Find," set the search criteria to match the type of information that you key into the search string.

Enter the information you know or want to find in the "Find" window. Use the drop-down list to identify the type of information you are searching. Identify how the search engine should try to match what you have entered in the "Find" window.

When the above criteria are set click on the "Find First" button and EAS will find the first match. Either continue searching with the "Find Next" button or "Cancel" the search and return to the browser screen. After using "Find," the last match would be highlighted after using "Find" and returning to the browser screen.

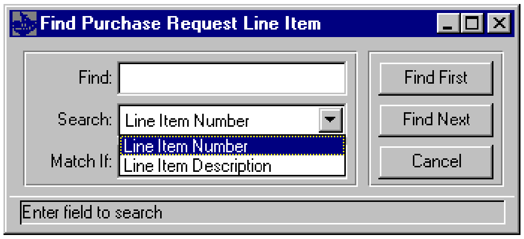

Find Award Line Item

Find:

Search: Line Item Number

Match If: Contains

Enter value to search for

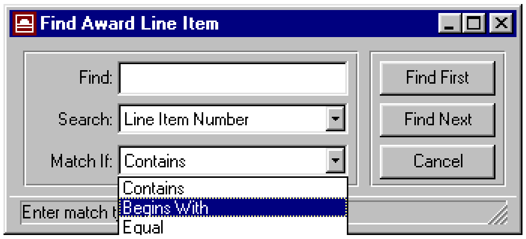

Find Purchase Request Line Item

Find:

Search: Line Item Number

Match If:

Enter field to search


Find Award Line Item

Find:

Search: Line Item Number

Match If: Contains

Enter match t

Note: The options listed in the drop-down selection lists for the "Search" and "Match" windows will vary, based on the information available on the browser screen.

WYSIWYG -- Printing Forms and Documents

This is a menu option located in the following worksheets:

Contracting, (Award Process, Solicitation Process, Request Process)
Contract Administration, (Award Process, Request Process)
Purchasing, (Award Process, Request Process, Solicitation Process)
Customer

EAS uses a WYSIWYG (What You See Is What You Get) print preview function to allow you to see work on standard federal forms before they are printed. In most cases the print function is accessed from the Summary Screen for the action open at the time. There are three specific instances where the WYSIWYG print function is not accessible from the Summary Screen. (The three specific cases listed below will be covered separately.)

PDS (FPDS, GPDS) Reports
Amendments
Modifications

Print processes for documents that do not use federal forms are printed without the WYSIWYG function. The print processes for those documents are addressed individually in the manual.

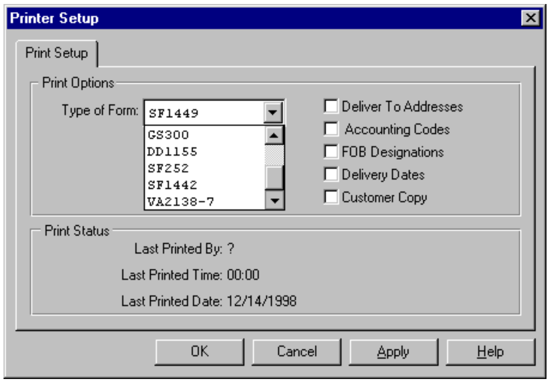
Printing from the Summary Screen

While in the summary screen of your contract action, select "File" from the menu bar, then choose "Print" from the drop-down menu.

Select form type from the "Type of Form" drop-down menu.

As EAS builds the document for printing, it displays a *Print Status Screen*. The time needed to build the WYSIWYG window will be proportionate to the size and complexity of the document.

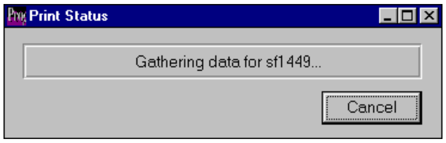
When all necessary data and forms have been assembled, the *Preview Screen* will appear.



Type of Form: SF1449
GS300
DD1155
SF252
SF1442
VA2138-7

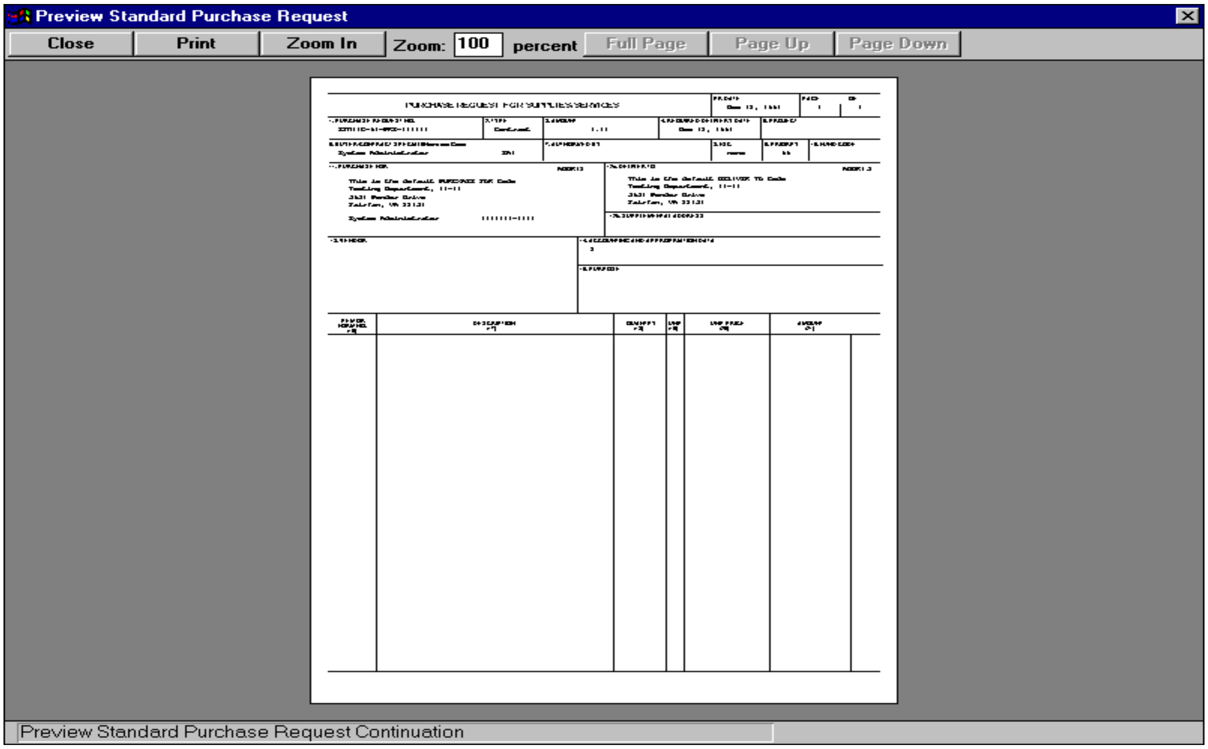
☐ Deliver To Addresses
☐ Accounting Codes
☐ FOB Designations
☐ Delivery Dates
☐ Customer Copy

Last Printed By: ?
Last Printed Time: 00:00
Last Printed Date: 12/14/1998



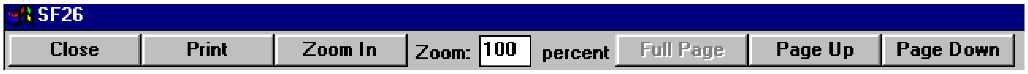
Gathering data for sf1449...

WYSIWYG Print Preview


Preview Standard Purchase Request
Close
Print
Zoom In
Zoom: 100 percent
Full Page
Page Up
Page Down

Preview Standard Purchase Request Continuation

From this window the document may be reviewed and checked. The following controls are provided to assist this process.


SF26
Close
Print
Zoom In
Zoom: 100 percent
Full Page
Page Up
Page Down

1-Close the preview window and return to the object window

2-Print the document

3-Zoom in to the upper left corner of the document

4-Enable user to enter specific percentage for zoom in

5-Bring user back to full page - Only active when user is in "zoom mode"

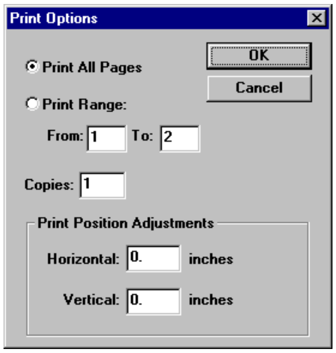
6-Display previous page

7-Display next page

Close:	Closes the preview screen and return to the object window without printing.
Print:	Prints the document. Once the document prints, the preview screen reappears.
Zoom In:	Magnifies the document by the percentage marked in the "Zoom" field. When the *Preview Screen* opens, the default is "100%." (A setting of "30%" is recommended.)
Zoom:	Magnifies the document by a designated percentage. To "zoom in," enter a percentage and click on the "Zoom In" button.
Full Page:	Resets the preview screen back to full page. This option is only active when the document is magnified.
Page Up:	Displays the previous page.
Page Down:	Displays the next page.

After reviewing the document choose the "Print" button to print a hard copy. The *Print Options Screen* will display to specify how much of your document is to be printed.

When this screen first displays, the "Print All Pages" radio button will automatically be selected. To print a selected number of pages, click on the "Print Range" radio button (in addition to entering the specified pages). Enter the pages to print and the number of copies.
"Print Position Adjustments" prints the form and subsequent pages at an offset from the margin. For example, to print the form an extra ¼ inch in from the left and ½ inch down from the top, enter ".25" in the "Horizontal" field and ".5" in the "Vertical" field.


Print Options

● Print All Pages

○ Print Range:

From: 1 To: 2

Copies: 1

Print Position Adjustments

Horizontal: 0. inches

Vertical: 0. inches

Note: If the printed documents are not automatically centered, check with your System Administrator (SA).

Note: WYSIWYG forms print to the printer specified in the Windows Setup. All other forms and reports still print to the printer specified in the User Profile.

Printing PDS (FPDS/GPDS) Reports

PDS reports may be printed at any time after the initial award action is created. When an award action is initially created, EAS uses standard FAR threshold values to determine if a report is required. If a report is required for a specific contract action, EAS automatically displays a prompt to create an *SF 279* report after completing a review of the *Line Item Screen.*

Printing the report at the time of the initial award action

After reviewing the line items on an award, EAS prompts you to complete the *SF 279*. To print the report, click on the "Reports" tab on the *SF 279 Screen.*

Click on the button "Print *SF 279"* to launch the *WYSIWYG Print Preview Screen.* When the *WYSIWYG Print Preview Screen* appears, review the form.

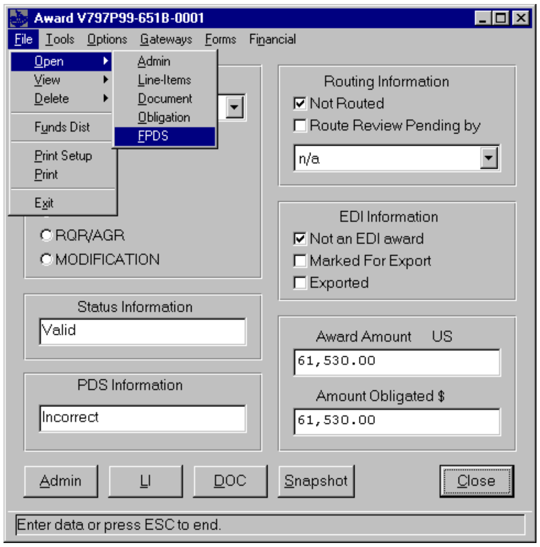
Note: If an SF 279 report with errors is printed, EAS will fill the signature block with 'X's to prevent the submission of a report with errors.

Printing the PDS report at a later time

Open the award. From the *Award Summary Screen*, click on "File" from the menu bar, then select "Open" and "FPDS." When the *SF 279 Report Screen*l displays, click on the "Reports" tab on the *SF 279 Screen.*

Click on the button "Print *SF 279*" to launch the *Print Preview Screen.* When the WYSIWYG *Print Preview Screen* appears, review the form.

Note: *If an SF 279 report has errors, EAS will fill the signature block with 'X's to prevent the submission of a report with errors.*


Award V797P99-651B-0001
File
Tools
Options
Gateways
Forms
Financial
Open
View
Delete
Funds Dist
Print Setup
Print
Exit
Admin
Line-Items
Document
Obligation
FPDS
Admin
LI
DOC
Snapshot
Close

Routing Information
☑ Not Routed
☐ Route Review Pending by
n/a

EDI Information
☑ Not an EDI award
☐ Marked For Export
☐ Exported

○ RQR/AGR
○ MODIFICATION

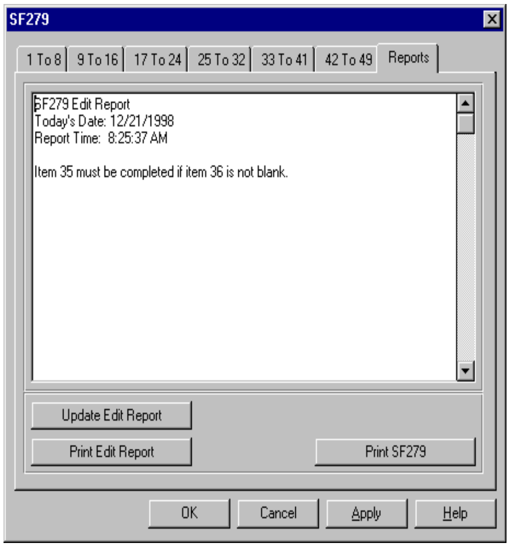
Status Information: Valid

PDS Information: Incorrect

Award Amount US: 61,530.00

Amount Obligated $: 61,530.00

Enter data or press ESC to end.


SF279
1 To 8
9 To 16
17 To 24
25 To 32
33 To 41
42 To 49
Reports
Update Edit Report
Print Edit Report
Print SF279
OK
Cancel
Apply
Help

SF279 Edit Report
Today's Date: 12/21/1998
Report Time: 8:25:37 AM

Item 35 must be completed if item 36 is not blank.

Printing Amendments to Solicitations

From the *Contracting/Purchasing Worksheet*, open the Solicitation that has been amended.

From the *Solicitation Summary Screen* click on "Options," then "Amendments."

When the *Amendment Browser* displays, highlight the desired amendment, then click on "File" and "Print." The *WYSIWYG Print Preview Screen* will display.

After reviewing the amendment, choose "Print" to print the *SF 30* form and continuation sheets, as needed. Close the screen to return to the *Amendment Browser.*

Printing Using MS Word

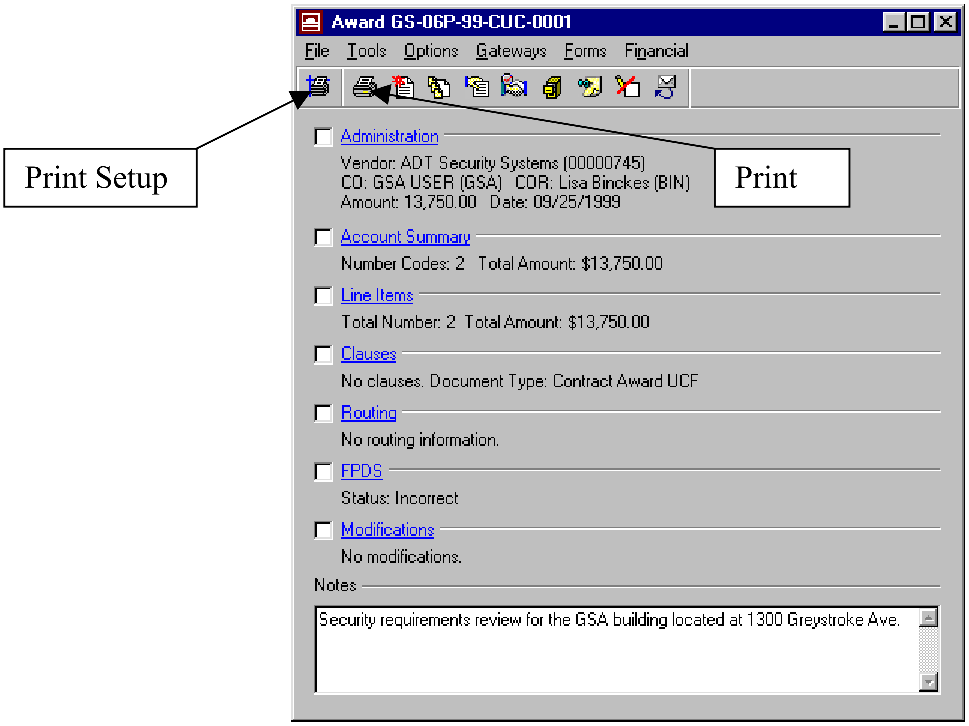
SETUP EAS FOR MS PRINTING - EAS Users can setup their profile for printing through MS Word by taking the following steps:

(a) From the desktop, click on "Options" then "Preferences" and "My Profile"
(b) Click on the "Preferences tab"
(c) Under "Forms Print/Preview Application"
(d) Click on "MS Word Radio Button"

(e) Click OK .

PRINTING IN MS WORD

When the User Profile is properly setup, EAS can print using MS Word, except for PDS Reports (FPDS, GPDS) and Amendments.


Print Setup
Print
File
Tools
Options
Gateways
Forms
Financial

Award GS-06P-99-CUC-0001

☐ Administration

Vendor: ADT Security Systems (00000745)
CO: GSA USER (GSA) COR: Lisa Binckes (BIN)
Amount: 13,750.00 Date: 09/25/1999

☐ Account Summary

Number Codes: 2 Total Amount: $13,750.00

☐ Line Items

Total Number: 2 Total Amount: $13,750.00

☐ Clauses

No clauses. Document Type: Contract Award UCF

☐ Routing

No routing information.

☐ FPDS

Status: Incorrect

☐ Modifications

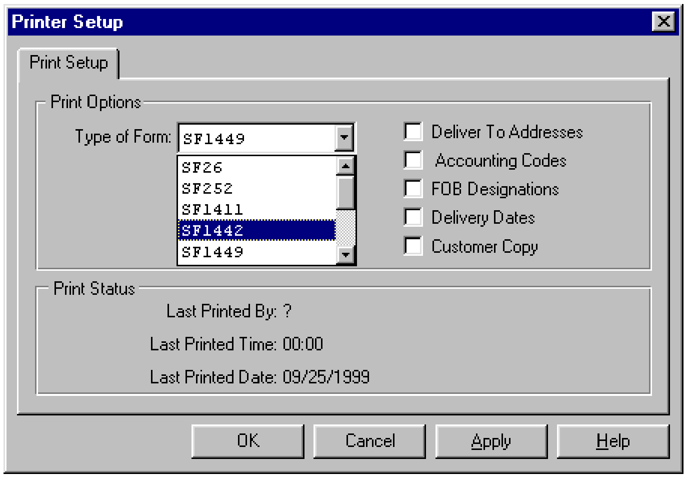
No modifications.

Notes

Security requirements review for the GSA building located at 1300 Greystroke Ave.

The print procedure is the same for Requisitions, Purchase Requests, Solicitations, Awards, and Modifications. The "Printer Setup" icon on the toolbar allows you to setup for printing. Printing can be done from the a summary screen in two ways: Use the icon located on the tool bar or click on "File" from the pull-down menu and select "Print."

The icon will bring up the *Printer Setup Screen* which allows you to chose the form to print, plus any additional information required on the printed document. To print additional information, a check mark must be placed in the box (es) shown to the right of the "Type of Form" check box.


Printer Setup
Print Setup
Print Options
SF26
SF252
SF1411
SF1442
SF1449
Print Status
OK
Cancel
Apply
Help

Type of Form: SF1449

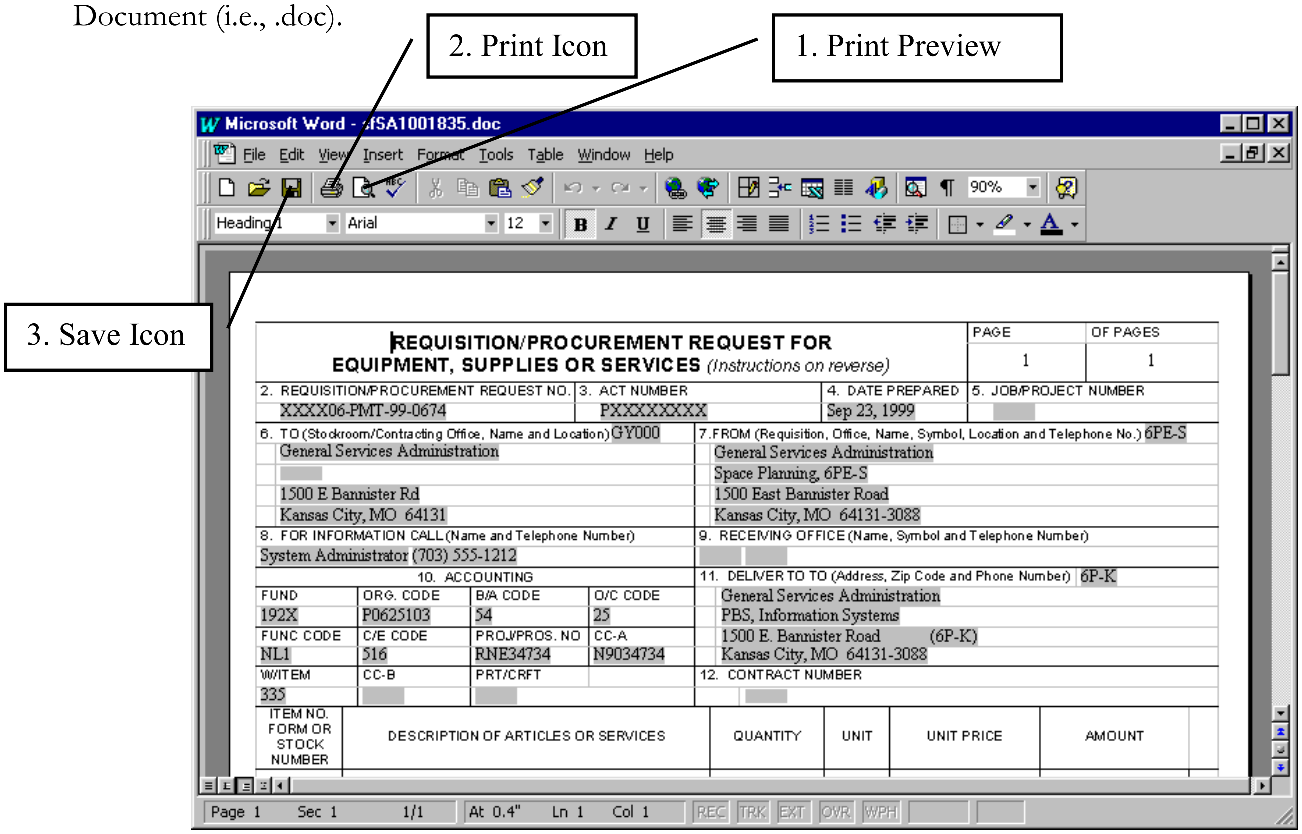
☐ Deliver To Addresses
☐ Accounting Codes
☐ FOB Designations
☐ Delivery Dates
☐ Customer Copy

Last Printed By: ?
Last Printed Time: 00:00
Last Printed Date: 09/25/1999

After clicking either on the 🖨 icon, or choosing "File" then "Print" from the pull-down menu, your document will process, launch and appear on the screen as an MS Word document in the MS Word program.

Note - While document is shown as a MS Word document, the fields are not protected and can be edited and modified. Any changes made to this document will not change the original file in EAS. Changes made to the document while in MS Word will print . This may affect the procurement form or data being printed; the possibility of erroneous information issued can happen.

From here preview the document as WYSIWYG. Print the document, or save it to disk as an MS Word Document (i.e., .doc).


2. Print Icon
1. Print Preview
3. Save Icon
Microsoft Word - SA1001835.doc
File Edit View Insert Format Tools Table Window Help
Heading 1
Arial
12
90%
Page 1 Sec 1 1/1 At 0.4" Ln 1 Col 1 REC TRK EXT OVR WPH

REQUISITION/PROCUREMENT REQUEST FOR EQUIPMENT, SUPPLIES OR SERVICES *(Instructions on reverse)*

PAGE 1 OF PAGES 1

2. REQUISITION/PROCUREMENT REQUEST NO. XXXX06-PMT-99-0674
3. ACT NUMBER PXXXXXXXX
4. DATE PREPARED Sep 23, 1999
5. JOB/PROJECT NUMBER

6. TO (Stockroom/Contracting Office, Name and Location) GY000
General Services Administration
1500 E Bannister Rd
Kansas City, MO 64131

7.FROM (Requisition, Office, Name, Symbol, Location and Telephone No.) 6PE-S
General Services Administration
Space Planning, 6PE-S
1500 East Bannister Road
Kansas City, MO 64131-3088

8. FOR INFORMATION CALL (Name and Telephone Number)
System Administrator (703) 555-1212

9. RECEIVING OFFICE (Name, Symbol and Telephone Number)

10. ACCOUNTING

FUND	ORG. CODE	B/A CODE	O/C CODE
192X	P0625103	54	25
FUNC CODE	C/E CODE	PROJ/PROS. NO	CC-A
NL1	516	RNE34734	N9034734
W/ITEM	CC-B	PRT/CRFT	
335			

11. DELIVER TO TO (Address, Zip Code and Phone Number) 6P-K
General Services Administration
PBS, Information Systems
1500 E. Bannister Road (6P-K)
Kansas City, MO 64131-3088

12. CONTRACT NUMBER

ITEM NO. FORM OR STOCK NUMBER	DESCRIPTION OF ARTICLES OR SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT

Item 1:	To see how the document will look as a printed document, click on the "Print Preview" icon on the toolbar. A new screen will open and the document will be displayed as WYSIWYG. From here, scan through the document, zoom in to see the type, and even print.
Item 2:	To print the document, click on the "Print" icon, and the document will immediately be sent to the printer. To print single pages, sections, or change the print parameters, go to the "File" pull-down menu and select "Print." The pull-down menu provides userswith more control over what and how to print.
Item 3:	To save the document as a MS Word ".doc" file, click on the "Save" icon. A dialog box will open, allowing the opportunity to rename and designate where to save the document for a file copy or future use.

Database Terms and Concepts

This section defines database terms and concepts and helps to clarify the role that EAS will play in your office.

How Is EAS Going to Help Me Do My Job?

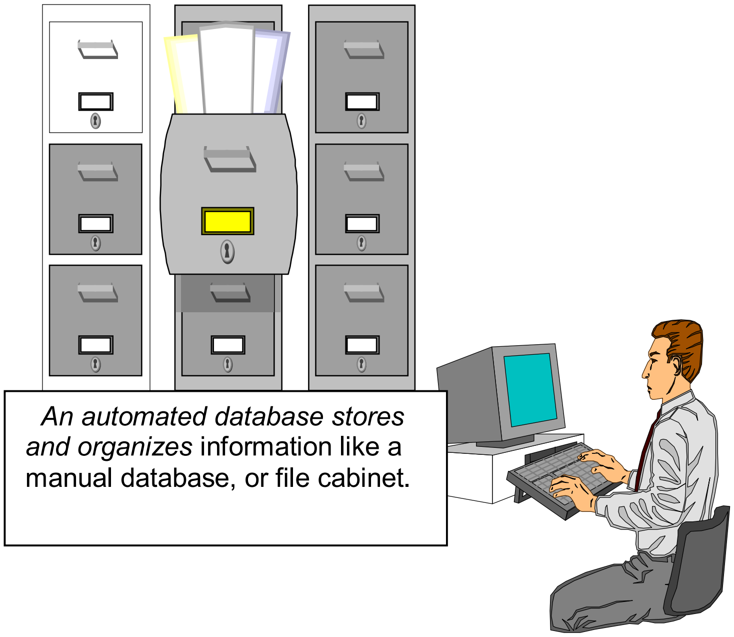
EAS is a tool designed to help procurement activities increase productivity in a flexible and user friendly environment. The more you know about EAS, the more useful it will become and the more your productivity will increase.

Is EAS Similar to a Word Processor?

EAS is a database that works with third party software such as MS Word ™ and MS Excel ™.

What Is A Database?

A database provides a central location for the storage and organization of files. A filing cabinet is an example of a manual database.



An automated database stores and organizes information like a manual database, or file cabinet.

EAS Concepts

Routing vs. Submitting

EAS is very specific about user roles, intervention and certain functions.

Routing

Routing enables users to electronically send an action for review and approval. From the requisition to the award, any stage within the lifecycle of the procurement can be *routed.* Any routed action will appear in the receiver's "Inbox" , indicated by a stack of papers . Whatever the users have sent will be found in their "Outbox" , also indicated by a stack of papers .

Submitting

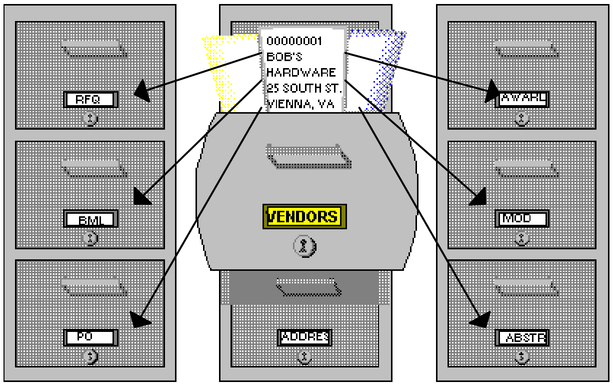
A requisition is created in the customer subsystem of EAS. Although a requisition may be routed for funding approval, EAS considers the action an *unfunded* request from a customer. In order for the requisition to be prepared, solicited and awarded, it must be sent to procurement (submitted), which is defined by the dollar value of the request.

If the amount is under $100,000(with the exception of commercial items which is $5,000,000) the action is sent to the Simplified Acquisitions Subsystem. All other actions that exceed $100,000 and above (the commercial item simplified acquisition threshold) should be submitted to Contracting. By submitting the requisition, it becomes a purchase request (PR), or a funded document. At this point, the procurement action lead-time (PALT) begins. The PALT time will effectively track the procurement until it is canceled or awarded. EAS provides you the flexibility to suspend the PALT time if needed.

NOTE: *It's important to keep in mind how EAS differentiates between a requisition (unfunded) and a purchase request (funded). Although the requisition has been authorized and funded at the requisition stage, EAS will recognize the request until it has been submitted and becomes a purchase request: a request that contains funding.*

Does an Automated Database do more than Store and Organize Files?

Although an automated, or relational database, stores and organizes files, the main purpose of a relational database is to provide a means of sharing of data between files and also between users. First, let's examine the sharing of data between files.



Notice that there is one main file where all vendor records are stored. Each vendor record can then be copied into various files and records in the database during the procurement process. This prevents users from having to re-enter data each time a vendor is used.

Data is also shared between multiple users in a database. This is known as a multi-user system.

Can Any User Access Any File in EAS?

The *security* function prevents unauthorized users from editing records. EAS allows users to view, copy and edit (given security permissions) centrally stored data files such as:

Addresses
Vendor Information
Accounting Codes
Product Service Codes

Procurement actions submitted to a user are considered to be "owned" by the user. Ownership of a record preserves the security and does not allow anyone but the authorized user (owner) to complete, edit, or change the owned record. Users can also search for and view historical information on any procurement record in EAS. However, only users who "own" a record can make changes.

Procurement actions can also be assigned to a "Team." Users can be assigned to a single team or multiple teams. Only the assigned users of a team can complete, edit, or change records assigned to that specific team. For example, a contracting office has two teams, one named "East" and the other named "West." Jim is assigned to East Team, Janet is assigned to West Team, and Earl is assigned to both East and West Teams. If a record is assigned to East Team, then Jim and Earl can complete, edit, or change the assigned record. If a procurement action is assigned to the West Team. Only Janet and Earl can work on the record.

Can More than One User Access a Central File or Record at the Same Time?

Multiple users can view, edit, or copy from a central file at the same time. While one user can edit a specific record, like the vendor record, at a time, it can be viewed or copied by multiple users at the same time. For example, one user can copy the vendor record for Bob's Hardware into a solicitation file while it is being viewed by another user in the vendor file. However, only one person may have a record open at a time for editing purposes.

EAS Workflow

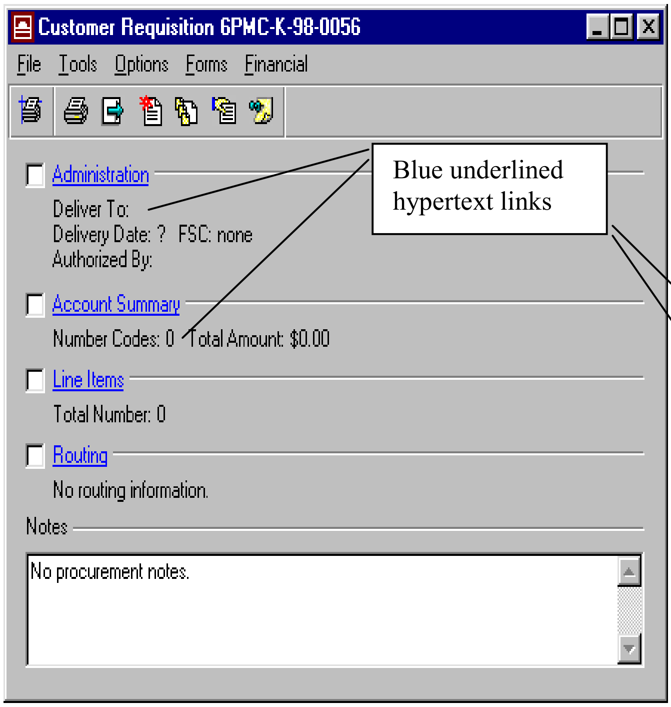
EAS is a “cradle to grave” procurement and contracting system. For this reason, EAS contains many different capabilities, tools, functions and screens.

It is not necessary to learn each of these tools and functions, or to review each of these screens in order to understand the system. This course does not cover all menu options and functions. Instead, this course covers the basic workflow processes of EAS, and then the basic procurement functions that EAS can perform. Once the course is completed and the basics have been mastered, it should be fairly easy to use functions that were not covered in the course.

Standard Processing of Procurement Records

All procurement actions are completed through summary screens. Each editable area of a summary screen shows as a blue, underlined, text link. When clicked, a hypertext link will take the user to the applicable screen to complete, edit, or change information in the procurement record. Samples of summary screens are shown below.

Customer Requisition Summary Screen



☐ Administration

Deliver To:
Delivery Date: ? FSC: none
Authorized By:

☐ Account Summary

Number Codes: 0 Total Amount: $0.00

☐ Line Items

Total Number: 0

☐ Routing

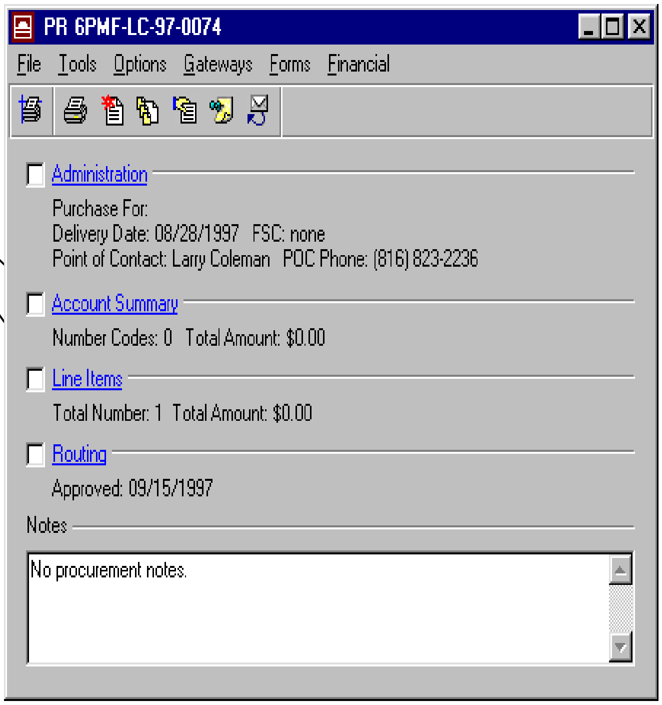
No routing information.

Notes

No procurement notes.

Blue underlined hypertext links

Purchase Request Summary Screen



☐ Administration

Purchase For:
Delivery Date: 08/28/1997 FSC: none
Point of Contact: Larry Coleman POC Phone: (816) 823-2236

☐ Account Summary

Number Codes: 0 Total Amount: $0.00

☐ Line Items

Total Number: 1 Total Amount: $0.00

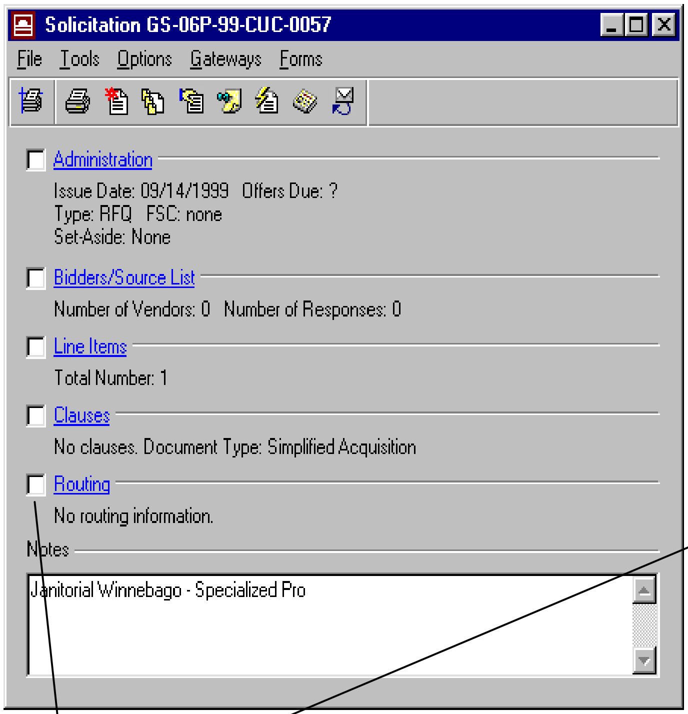
☐ Routing

Approved: 09/15/1997

Notes

No procurement notes.

Solicitation Summary Screen


Solicitation GS-06P-99-CUC-0057
File Tools Options Gateways Forms

☐ Administration

Issue Date: 09/14/1999 Offers Due: ?
Type: RFQ FSC: none
Set-Aside: None

☐ Bidders/Source List

Number of Vendors: 0 Number of Responses: 0

☐ Line Items

Total Number: 1

☐ Clauses

No clauses. Document Type: Simplified Acquisition

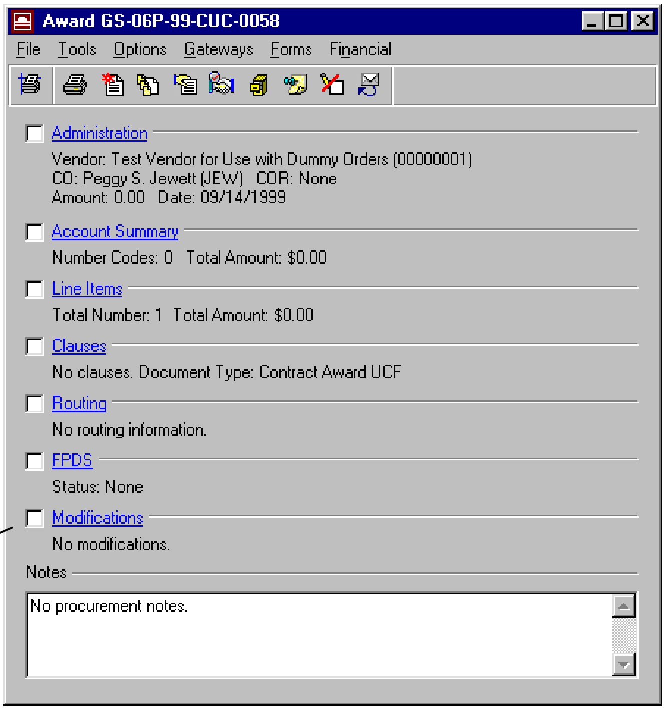
☐ Routing

No routing information.

Notes

Janitorial Winnebago - Specialized Pro

Award Summary Screen



☐ Administration

Vendor: Test Vendor for Use with Dummy Orders (00000001)
CO: Peggy S. Jewett (JEW) COR: None
Amount: 0.00 Date: 09/14/1999

☐ Account Summary

Number Codes: 0 Total Amount: $0.00

☐ Line Items

Total Number: 1 Total Amount: $0.00

☐ Clauses

No clauses. Document Type: Contract Award UCF

☐ Routing

No routing information.

☐ FPDS

Status: None

☐ Modifications

No modifications.

Notes

No procurement notes.

A **square block** is located to the left of each hypertext link. The purpose of this box is for the convenience of the user. The user can place a check in the box by clicking the left mouse button over the block. It is recommended that once a section of the procurement record is finished, you can place a check in the block as a quick reminder that the section has been completed.

All procurement records in EAS are divided into the same basic sections. Requisitions and Purchase Requests for instance, all consist of two basic sections: Administrative information and Line Item data. Solicitations and Awards also consist of Administrative Information and Line Item data as well as a Clause section.

Awards consist of Administrative Information, Line Item data, and Document and Financial Reporting.

Six Basic Steps in the Workflow Process

The workflow process in EAS follows the flow of the procurement workflow process as described below:

1. A requisition is created and submitted to the Procurement Office from a Requesting Agency (SEE: Customer Requisition Summary Screen). In EAS, this requisition can be submitted electronically or manually.

2. A Purchase Request (PR) is created in EAS and Procurement Action Lead Time (PALT) begins (SEE: Purchase Request Summary Screen). This occurs automatically if the requisition has been submitted electronically from the Customer subsystem. This is the most important step in the EAS workflow process because without a Purchase Request, no other procurement records can be created.

3. A solicitation can be created for the Purchase Request (SEE: Solicitation Summary Screen). This step can include the building of a bidder's mailing list, the creation of a bid abstract and the creation of an amendment. However, none of these processes is mandatory.

4. An award can be created and PALT time stopped (SEE: Award Summary Screen). If an award is never created PALT time continues to accumulate for the PR, unless the PR is canceled or deleted. This step can include the creation of modifications.

5. Receipts and Invoices can be recorded for the PR. This step is not mandatory and a PR/award can be closed out even if it has not been fully received.

6. The PR/award can be closed out and must be closed-out in order to be archived. Once a PR/award is closed-out, it cannot be re-opened. Close-out is final.

Definitions

This section defines EAS specific procurement and database terms.

Procurement Terms

EAS:	**E**lectronic **A**cquisition **S**ystem.
User:	Any person who utlilizes the EAS program.
Requisitioner:	Person who submits a *GSA 49* for supplies or services.
Contracting Officer:	Person with the authority to enter into, administer, and/or terminate contracts.
Contracting Activity:	Element of an agency designated by the agency head and delegated.
Contracting Officer (Technical) Representative (COR/COTR):	Person who has been designated by the contracting officer with the responsibility to ensure the contractor is meeting the terms and conditions of the contract.
Fund Certification Official (FCO):	Person who is responsible to certify, commit, and obligate funding.

Database Terms

Data:	A collection of information to be processed.
Database:	Data stored and organized in a collection of related files.
File:	Data stored and organized in a collection of related records.
Record:	Data that is organized into individual fields.
Field:	Specific data contained within a record.
Index:	A field that uniquely identifies a specific record.